

Application Guidance:

Landscaping Regional Research and Leadership Capacities for the Study of Human Flourishing

Please contact andrica@templetonworldcharity.org if you have any questions about this request for proposals or anything listed in this document.

Goals of this RFP

Over the next five years, Templeton World Charity Foundation seeks to award several research and capacity-building grants for international and interdisciplinary scientific research on topics central to human flourishing. To better inform its planning, the Foundation seeks applications for landscaping research to map the relevant academic, leadership, training, and partnership landscapes in one or more of the following regions: Latin America, the Caribbean, Africa, the Middle East, South Asia, South-East Asia, and East Asia.

Application Registration Guidance

This section will guide you through completing the two-step application process in the TWCF online portal: The instructions and definitions for each field are included below:

Step 1: Submit an Expression of Interest

The application will be completed on Fluxx, the TWCF grant management system. Registration is initiated by completing the Expression of Interest form found [HERE](#). Please note information cannot be saved in the form, therefore be sure the form is complete in its entirety and submitted before leaving the Expression of Interest webpage.

If your registration is approved, you should receive an email within 3 business days from the "Templeton Portal" with information on the next steps and how to access the application form. Unsuccessful registrants will also be notified.

We recommend you do this as early as possible to ensure adequate time to complete the full proposal.

Step 2: Accessing Full Proposal Dashboard, Fluxx

How to log in

1. Sign in [here](#) using the email and password you created during the registration process (step 1).

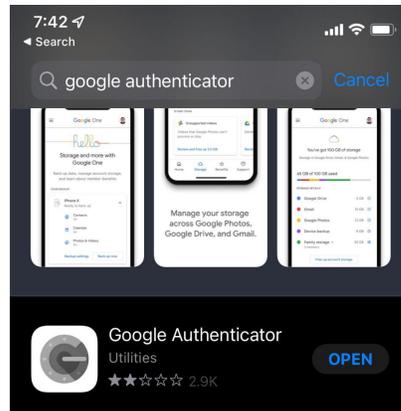
2. Once logged in, you will be asked to set up a Multi-Factor Authenticator (see below).

Setting up Multi-Factor Authentication

When setting up your MFA, **Do not use SMS to set up your MFA. Only use google authenticator or another similar app.**

To do this, take the below steps:

1. Download the Google Authenticator App on your mobile device. You may already use this for your second verification tool for your Gmail.



2. Follow the instructions on the Fluxx site by scanning the QR code with the authenticator app.

If you receive the error message below please contact techsupport@templetonworldcharity.org and cc andrica@templetonworldcharity.org for immediate assistance.

We're sorry, but something went wrong.

We've been notified about this issue and we'll take a look at it shortly.

Step 3 (optional): Adding collaborators to the Fluxx account

You can enable one additional person to access and edit the application form, in addition to the lead applicant. Based on the user status and organization of the additional collaborator, please follow one of the three scenarios listed below:

1. **The collaborator is a member of the same organization as the primary user but is NOT yet a Templeton Fluxx User.** Ask a collaborator to register on Fluxx via this [link](#). Once they have registered and received the next step email, the primary user of the application form should be able to add this collaborator as “Project Administrator” within the “Organization” subsection of the application form on Fluxx.
2. **The collaborator is not a part of the same organization as the first user and is NOT yet a Templeton Fluxx User.** Email techsupport@templetonworldcharity.org and ask that a user be created. Provide the following information: The full name, the email address, and the employer of the collaborator. Once tech support has confirmed that this user has been created, the primary user of the application form should be able to add this collaborator as “Project Administrator” within the “Organization” subsection of the application form on Fluxx.
3. **The collaborator is NOT with the same organization as the primary user and IS already a Templeton Fluxx User.** Email techsupport@templetonworldcharity.org and ask that the user be linked to your organization. Provide the following information: The full name, the email address, and the employer of the collaborator.

Contract Signatory and Grantee Representative Users

You will also see options to add users to the Contract Signatory and the Grantee Representative Roles in the Organization subsection of the application form. If you see the appropriate person in the drop-down box of these fields, you can select this person. **However, this will not be a requirement until after the downselection stage of this RFP.** If you do not add a person at this stage, or if the name of the person is not in the dropdown, we will give you instructions at a later stage to complete this (and also help you to get people added to these roles).

Applicants may submit applications for more than one award as listed above. Each award application will be considered on an individual basis and administered via a distinct agreement with the Foundation.

Prospective applicants as hub leaders are not excluded from this RFP; however, their landscaping analysis should be impartial to their research agendas.

Application Field Guidance

The following section outlines the questions included in the submission portal and provides instructions for answering the questions. The instructions in this document take precedence over the instructions in the submission portal, which are written for proposals that are not a part of this RFP.

Organization Information

Project Organization: *Enter the name of the organization that will execute the project's activities. This is normally the Project Director's institution.*

Project Director: *Enter the name of the Project Director who will have intellectual leadership, make executive decisions for the project, and will ultimately be responsible for the grant.*

The information below provides guidance to complete the "ORGANIZATION FORM" found in the left-hand toolbar as instructed in Fluxx.

Organization Form

The organization form (found under "ORGANIZATIONS") is a separate form from the grant request form and will also need to be submitted.

Provide information about the organization that would, if your proposal is successful, receive the grant award from TWCF.

If this organization has been awarded a grant in the past, likely, it is already in our system, and you will not have to provide more information other than confirming that the details are still correct.

If it is an organization that the Foundation has not granted to before, the following information will be requested:

- *Organization Name*
- *Also Known As*
- *Street Address, City, State/Province, Country, Postal Code*
- *Website*
- *Organization Structure*
- *Tax Class*
- *Tax ID*
- *Registration Number*
- *Mission Statement*

- *50% Funding? Did the Organization receive 50% or more of its annual funding in any one of the last three years from any combination of Templeton Religion Trust, Templeton World Charity Foundation Inc., or John Templeton Foundation?*
- *Parent Organization*

Board Members or Shareholders

If the organization is not a university or accredited college, the application form will also ask for the following information for each Board Member and/or for each Shareholder owning more than 25% of total shares.

- *First Name*
- *Middle Name*
- *Last Name*
- *Politically Exposed? Is this person classified as a "Politically Exposed Person?" Politically exposed persons are defined as individuals who hold or have held, in the preceding year, important public positions, such as heads of state; heads of government; senior officials in the executive, legislative, administrative, military, or judicial branches of a government, whether elected or not; senior officials of major political parties; and senior executives of government-owned corporations.*

Corporate Governance Documents

If the organization is not a university or accredited college, the application form will also ask for the following documentation:

- *If a Not-for-Profit:*
 - *Certificate of Incorporation or Equivalent*
 - *Memorandum and Articles of Association, or Equivalent*
 - *Evidence of Charitable Status*
- *If a for-profit:*
 - *Certificate of Incorporation or Equivalent*
 - *Memorandum and Articles of Association, or Equivalent*
 - *Certificate of Good Standing or Most Recent Audited Financial Statement*
 - *Register of Officers, Register of Directors, or Equivalent*
 - *Register of Shareholders*

Other questions about the Legal Organization

TWCF Relationship? *To the best of your knowledge is the President, any Chief Executive Officer, or Head of this Organization a TWCF Trustee, Officer, or Staff Member, or related to a TWCF Trustee, Officer, or Staff Member as a spouse, sibling, child, or parent? If yes, please provide details of the relationship, and the name of the TWCF Trustee, Officer, or Staff Member.*

PD Employed by Legal Org? *Is the project director employed by the legal organization? If not, please provide a letter of support from the Project Director's employer. The letter should come from the director of the employing organization (or someone of a similar role) and should confirm the employer's support for the time that the Project Director would spend leading the grant activities outlined in this proposal.*

Project Details

Project Start Date: *This field has been prefilled. Ideally, we would like the grant to begin on **September 1st, 2023***

Project Duration (Must be a whole number): *Please enter the project's duration in months. The project duration should not be greater than 18 months.*

End/Close Date: *Please enter the end date of the grant.*

Project Title: *The title of your proposal should be "ECoH Landscape Review: include your "Region": and "Project Director Last Name". For example, ECoH Landscape Review: Caribbean: Doe*

Executive Summary: *Executive Summary is a brief statement written for educated non-specialists setting out the aim of the project, why you are best suited to achieve the anticipated outcomes, and your relevance to the field. You do not need to include information about the project team or organization in your Executive Summary. We strongly recommend that you write the Executive Summary after you have completed the rest of the proposal. (Word Limit 500)*

Relation to Sir John Templeton's Donor Intent: *This section should provide a high-level overview of how the project relates to The Foundation's aspiration to support new scientific discoveries related to how we can promote human flourishing in the context of diverse experiences and perspectives. For more information on the broader topic of donor intent, the TWCF website has links to selected published works by Sir John Templeton at the bottom of the [Our Founder](#) page. (Word Limit 350)*

Project Description: *The Project Description should provide a specific, concrete, concise, and detailed plan of all the activities that are relevant to your project. Please define and explain technical terms when they first occur, especially terms that are used with a specific meaning within the proposal. In this section elaborate on your relevant fieldwork, methodology, an outline of activities, and timeline. Examples of previous relevant work should be uploaded to this section and/or the "Other Documents" section if needed.*

The research methodology should provide a clear and concise picture of how the project will be conducted, including specific activities, steps, and data analysis plans. The literature review or review of prior work should give necessary background information for aspects of the project in which reviewers may not be experts themselves and give confidence that the applicants are

knowledgeable in the topic areas. The research methodology should provide a clear and concise picture of how the project will be conducted, including what equipment will be used, what specific steps will be taken, and data analysis plans. **(Word Limit 5000)**

Budget

Currency: USD

Maximum Request Amount: USD 260,000

Budget Template. You will be asked to complete a budget template similar to [this one](#).

Budget Limitations & Extra Allowances:

Limitations

- *Overhead. The Foundation will approve an added component for overhead within the budget, which is no more than (fifteen) 15%. Overhead costs are general overhead and administrative expenses that support the entire operations of a grantee and are incurred for common or joint objectives. Expenses that would be incurred regardless of whether the grant is funded are often indicative of overhead costs. This additional component can be applied to all direct costs. Any overheads which are a part of sub-contracts should be included in the Overhead section of the budget. The Foundation welcomes proposals that request a lower percentage for overhead costs.*
- *Travel and Lodging for the Personnel Employed by the Legal Organization and One Additional Instructor can be completely underwritten by the Foundation for all project activities. However, the Foundation has much stricter limits for the travel and lodging costs associated with anyone who is not employed by the Legal Organization, such as a Project Co-Leader at another institution or a conference presenter from another institution. The details of this limitation are complicated and this form has been designed to handle various cases. In general, TWCF does not fund projects with budgets that exceed 10% travel and lodging costs for persons not employed by the Legal Organization. Please note that TWCF will not pay for first-class or business travel.*

Extra Allowances

- *Disability Accommodation. Supplement funds of up to USD 10,000 (beyond the USD 250,000 maximum) can be included in the budget request to cover disability accommodations, making it possible for the project team member to perform the essential functions associated with their role in the project. The accommodations requested must be directly related to the performance of the proposed role on the research project and must be appropriate for the disabilities of the individual. Include this cost in the budget section "Other".*

Classroom Teaching. *In the currency indicated above, please enter the total amount of this request that will be spent on classroom teaching. This amount can be found as a calculated cell in the "Budget Summary" tab of the Budget template that was uploaded above.*

Additional Funding Description. *If you have listed additional funding. Please list the names of other sources of funding for this project, the amount provided by each source, whether or not each source of additional funding has been secured, and if not what your plans are for securing each source of potential additional funding.*

Additional funding must be included in the relevant cell(s) in your budget spreadsheet and must support components that are integral and specific to the activities described in your Project Description. Qualifying sources of additional funding include funds from other philanthropic organizations, in-kind support from the employers of project personnel, or donated time of project members. The following should not be included as sources of additional funding: funds for purchasing equipment not solely used for the proposed project; funds to cover costs for activities associated with but not specifically a part of the proposed project; donated overheads or "full economic costs" above TWCF's limit of 15%; support for activities that will occur before or after the project".

A Letter of Support, Award Letter, or equivalent, specifying additional funding, is required if ANY of the following apply:

- The additional funding is both secured and required by TWCF policy, such as when a project requires at least 50% of co-funding to be eligible for follow-on or renewal funding or to be compliant with travel and lodging restrictions.*
- It is in the form of a financial (not in-kind) contribution from a specific contributor and is the only reasonable means to complete a specific output listed in the proposal.*
- A letter is otherwise requested by TWCF program staff.*

Real Estate, Endowments, Art? *Will any of the funds that you are requesting be used either (a) for the purchase of land, or the purchase or construction of a building, (b) to establish or support an endowment of any kind, (c) to fund artistic productions or purchases, or (d) to purchase equipment that is not a vital component of the project?*

Flow of Funds. *Other than the country within which the Legal Organization is located, please provide the name of the country or countries to which grant funds would flow, or within which grant funds would be expended, or with which the Project Director or Project Co-Director (if there is one) have an affiliation.*

Outputs

For your awareness we have indicated in the RFP Terms of Reference document outputs we expect to come out of this work. See the list below:

- *Exploratory convenings with regional researchers and practice community leaders to contribute to reporting fact-finding and analysis*
- *A report of 80 pages minimum, for TWCF*
- *A 20-page report for stakeholders (such as research funders, senior management of research institutions, or policymakers)*
- *A PowerPoint presentation of the main findings and key statistics*
- *A regional stakeholder convening to disseminate findings from the report, particularly those that may be of interest to potential funding partners for TWCF*

Below is an example of how this section should be completed:

- **Output Title:** *Exploratory Convening*
- **Audience:** *Regional Researchers and Practice Community Leaders*
- **Deliverables Description:** *An exploratory convening with regional researchers and practice community leaders to contribute to reporting fact-finding and analysis*
- **Output Quantity:** *1*
- **Completion Month:** *12 months (Within how many months after the start date do you expect to deliver all outputs in the entry.)*

***Note re Open Access:** *If the output is a public-facing report, article, dataset, code, software, or protocol, please explain here how you plan on sharing the output in alignment with TWCF's [open research policy](#).*

Outcomes

If a project is funded, you should be prepared to report on the progress you have made toward the Outcomes that you can track and report to TWCF throughout the project. To this end, please find below the expected outcome of the project(s):

- *Stakeholders (such as researchers, leaders of research institutions and organizations, and funders) working in or supporting scientific research on topics central to human flourishing will better understand field-specific research capacity, needs, and opportunities in diverse regions worldwide.*
- *Templeton World Charity Foundation will be better informed and equipped to develop effective funding mechanisms for interdisciplinary scientific research on topics that are central to our understanding of human flourishing in diverse regions worldwide.*

For each outcome, you will be asked the following questions:

- **Title:** *Increased knowledge of research capacity, needs, and opportunities in diverse regions worldwide.*
- **Description:** *Stakeholders (such as researchers, leaders of research institutions and organizations, and funders) working in or supporting scientific research on topics central to human flourishing will better understand field-specific research capacity, needs, and opportunities in diverse regions worldwide.*
- **Short-Term Indicators:** *Funders will gain a better understanding and awareness of areas to contribute to aimed to build the field of the science of human flourishing. **(Indicators of success are expected to be noticed within 12 months of the closure of the grant.)***
- **Long-Term Indicators:** *Funders' strategies and decisions, research institutions: prioritizing strategic capacity building and field-building activities over others; researchers: more of them to become producers of high-quality research. **(Indicators of success are likely not observed until 12 months after the closure of the grant.)***

Team Members

In this section, all Team Members must be entered according to their respective roles. Role options include Project Director (required), Co-Director (if applicable), Known Team Member (if applicable), and Unfilled Role (if planning to hire). Keep in mind while assembling your team that the most successful teams are those whose members are amenable to open communication and collaborative work.

*The **Project Director (PD)** is responsible for managing the project as a whole and serving as the ultimate authority on all matters internal to the project. Keep in mind while assembling your team that the most successful teams are those whose members are amenable to open communication and collaborative work. We strongly encourage applicants to include only a single Project Director but allow up to one additional person to serve as **Project Co-Director (PCD)** where there is a strong specific case. In such cases, the Project Director and his or her Co-Director share executive authority over the project. Note: A Project Co-Director who is outside the Project Director's institution must indicate his or her institution and provide a letter of support from their institution.*

*In addition to the Project Director and the Project Co-Director, include any **Known Team Members**, in which a person will dedicate more than 10% of their time to the project, or else are named in the budget and are receiving more than USD 5,000 from TWCF. Examples include leaders of subprojects (i.e. "project leaders"), post-doctoral researchers, graduate students, research assistants, etc. Project Leaders may provide direct oversight and leadership of sub-components of a project, but they (and other personnel under their leadership) do so under the general oversight of the Project Director(s).*

*In addition to the Project Director (required), Project Co-Director (if applicable), and any other Known Team Members, include any **Unfilled Roles** in which a person will dedicate more than 10%*

of their time to the project. In each case, specify how they will be appointed. The percentage of time committed to the project should be given as an average over the duration of the project.

For each team member, you will be asked to provide the following:

- **Team Member Role** (*Project Director, Project Co-Director, Other Known Person, Unfilled Role*)
- **Role Description** (*only Other Known Team Member or Unfilled Role*)
- **Plan to Fill Role** (*only Unfilled Role*)
- **Professional Title** (*Project Director, Project Co-Director, or Other Known Member only*)
- **Prefix** (*Project Director, Project Co-Director, or Other Known Member only*)
- **First Name** (*Project Director, Project Co-Director, or Other Known Member only*)
- **Middle Name** (*Project Director, Project Co-Director, or Other Known Member only*)
- **Last Name** (*Project Director, Project Co-Director, or Other Known Member only*)
- **Nationality** (*Project Director or Co-Director only*)
- **Employed by Legal Org?** *Is this person (or will this person be) employed by the legal organization? Note: Being employed by the legal organization generally means they are your main employer and pay for your benefits.*
 - If No, **Employer.** *As this Team Member is not employed by the Legal Org, please name the Team Member's employer.*
 - If No, **Employer Paid by Legal Org?** *Will funds be flowing from the legal organization to this employer?*
- **Work Address** (*Project Director or Co-Director only*)
- **TWCF Relationship?** (*Project Director or Project Co-Director only*) *To the best of your knowledge, is this person a TWCF Trustee, Officer, or Staff Member, or related to a TWCF Trustee, Officer, or Staff Member as a spouse, sibling, child, or parent?*
- **CV** (*for the Project Director, Co-Director (if applicable), and any known team members.*)
- **Letter of Support (LoS)** *is also required from any known personnel if any of the following apply:*
 - *The known Team Member is a Project Co-Director or a subproject leader and is not employed under the Project Director, Project Co-Director, subproject leader, subcontractor (such as an external service provider), or subgrantee.*
 - *The known Team Member is dedicating more than 10% of their time to the project and is not employed under the Project Director, Project Co-Director, subproject leader, subcontractor (such as an external service provider), or subgrantee.*
 - *The known Team Member is named in the budget, is receiving more than USD 5,000 from TWCF, and is not employed under the Project Director, Project Co-Director, subproject leader, subcontractor (such as an external service provider), or subgrantee.*
 - *A letter is otherwise requested by TWCF program staff.*

Additional Organizations

Additional Orgs? *Are there any additional organizations for this project? An additional organization is defined as a sub-grantee or sub-contractor that will receive a significant amount of money and is deemed to be crucial to the project.*

For each additional organization added, you will be asked to provide the following information:

- **Organization Name**
- **Street Address, City, Country, Region, Post Code**
- **Primary Contact.** *Please provide the full name of the primary contact for this organization.*
- **Org Role.** *Briefly describe the role that this organization will play in the project.*

Charter Compliance

TWCF Authority? *To the best of your knowledge, will a TWCF Trustee, Officer, or staff member (or a member of their immediate family) have authority over or responsibility for the grant? If yes, please name these individuals, and explain how they will have authority over the grant.*

Renewal or Follow-Up? *Is the work of the proposed project similar to, or does it further expand the work of, an active or closed grant with the applicant (or applicant's Legal Organization) received from TWCF? If yes, provide, to the best of your knowledge, the following information about any grant that applies: project title, grant identification number, grant amount, grant end date, and a very brief synopsis of the project activities. Then, explain how this proposed project is similar to, builds on, furthers, or expands the work of the active or closed grant.*

Submitted Elsewhere? *Has this proposal, or a substantially similar proposal, been submitted to another organization for funding? If yes, what is the status of the previously submitted proposal?*

Politically Exposed Persons? *Can any of the persons involved with the project, including Senior Officers and Board Members, whether employed by the Legal, or Parent Organizations, any additional organization(s), or any of the sub-grantees (if any), be classified as a "Politically Exposed Person"? Politically Exposed Persons are defined as individuals who hold or have held, in the preceding year, important public positions, such as heads of state; heads of government; senior officials in the executive, legislative, administrative, military, or judicial branches of a government, whether elected or not; senior officials of major political parties; and senior executives of government-owned corporations. If yes, please provide details about the classification of this person (or persons) as a Politically Exposed Person.*